https://www.financial-planning.com/list/future-proof-debuts-inaugural-ai-demo-drop

Diana Cabrices hosts the inaugural AI Demo Drop on Sunday, Sept. 7 at Future Proof in Huntington Beach, California.
Rob Burgess/Financial Planning

AI takes the spotlight as 7 fintechs pitch their products to advisors
By Rob Burgess
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When Matt Middleton, founder and CEO of Future Proof, first put out the call for an AI-focused demo drop, he didn't know what kind of response he would receive.

Usually his instinct would be to make it a big tent, but he decided to focus on little-known AI-native fintechs serving the wealth management industry. For Future Proof's previous demo drops, he'd receive around 80 applications. For the AI-specific event, he got over 100.

That pool was cut down to around 60, then further winnowed down with the help of a panel of internal and external judges, said Middleton.

"From there, we cut it down based on the number of time slots we have for that given session," he said. "Because we want to make it fast-paced."

The result? Seven firms, each given seven minutes on Future Proof's main stage on the fest's opening night to make the case for their services during the very first AI Demo Drop in Huntington Beach, California.

Diana Cabrices, founder of Diana Cabrices Consulting, emceed the event.

"AI has quickly become the heartbeat of some of the best technology out there. And again, AI is going to be everything we're going to see on this stage today," Cabrices said in her introduction. "It's quickly outperforming human tasks and doing it at record speeds and at unseen levels of intelligence."

Here are the seven firms that made the cut, and how executives from each pitched their products:

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Benjamin AI

Benjamin AI CEO Toby Wade
Rob Burgess/Financial Planning

Benjamin AI seeks to combine analytics with natural language prompts, said CEO Toby Wade.

One way to think about his company, he said, is "if Bloomberg and ChatGPT got together and had a baby, you'd be Benjamin AI."

Wade said his background, including as a quantitative analyst on Wall Street and as head of machine learning at Gemini, reporting directly to the Winklevoss twins, made him realize "how cumbersome and time consuming it could be to produce high-quality research."

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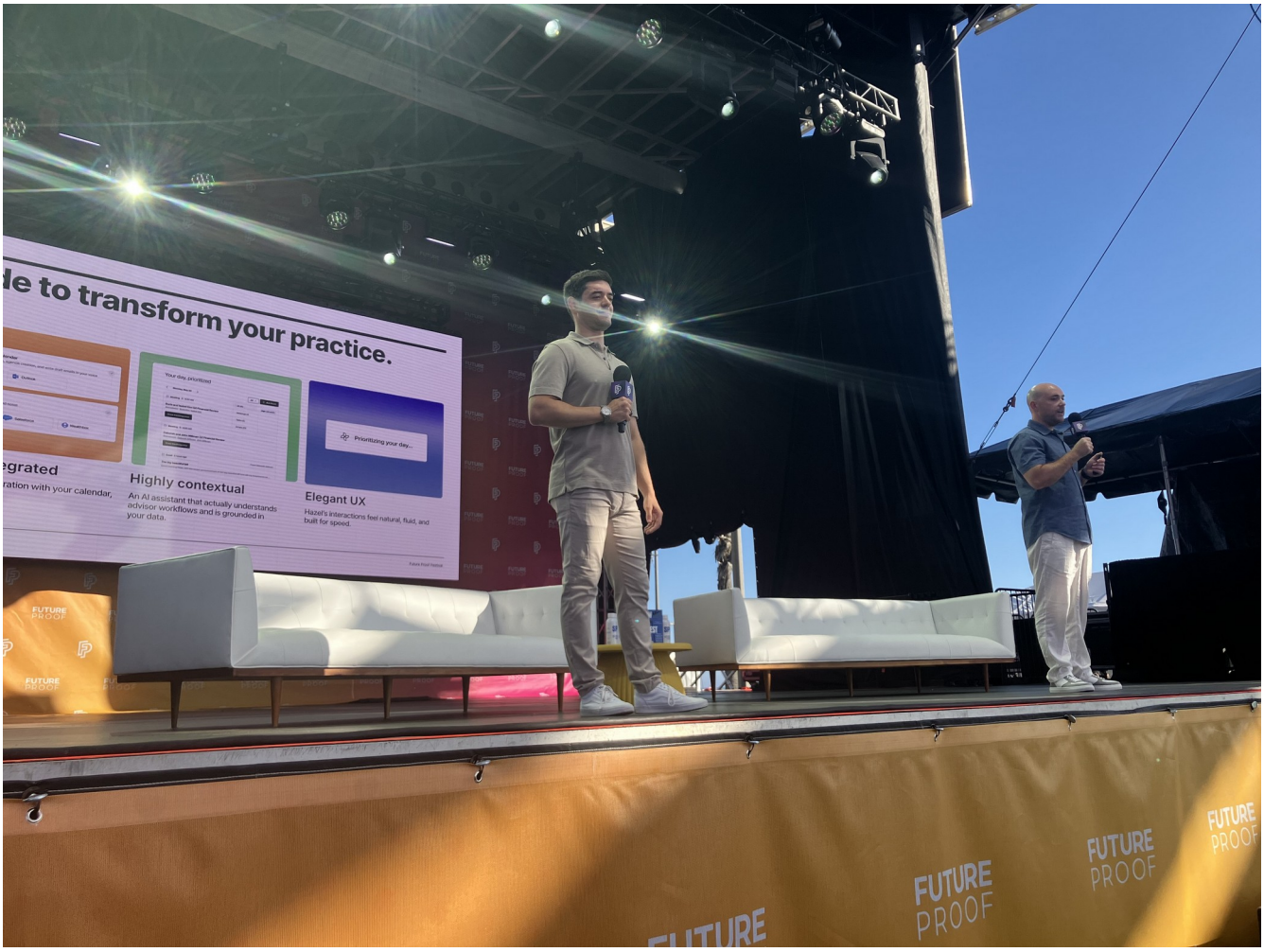
Altruist


le to transform your practice.
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ration with your calendar.
Highly contextual
An AI assistant that actually understands advisor workflows and is grounded in your data.
Elegant UX
Hazel's interactions feel natural, fluid, and built for speed.
FUTURE PROOF
FUTURE PROOF
FUTURE PROOF
Altruist Head of Product Marketing Steve Kane
Rob Burgess/Financial Planning

Altruist recently debuted its flagship AI product, Hazel, essentially a virtual administrative assistant that aims to save advisors time.

Steve Kane, head of product marketing at Altruist, said standalone platform Hazel is now moving out of beta and into general availability.

"The biggest value that you have is all that human stuff," he said. "It's connecting with clients and helping them transition through big life transitions. It's connecting with them and helping them make sense of all the market chaos. We think that we can help you do more of that human stuff when you have Hazel on your team."

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AgentSmyth

AgentSmyth CEO Pulkit Jaiswal
Rob Burgess/Financial Planning

AgentSmyth provides different AI agents for equity analysis and specific trading insights, said CEO Pulkit Jaiswal. The firm has been live for around nine months and is active with over 50 trading desks worldwide.

"We are basically a family of five agents," he said. "You can think of them as traders on a trading floor. We have a macro agent, a sentiment agent, an earnings expert, a quant and an options trader."

All five of these AI agents continuously maintain a paper trail, said Jaiswal.

"We basically model the personalities of these agents around these five different personalities," he said.

On top of those, Jaiswal said his firm is debuting its new AI agent: Agent Wealth.

"We built Agent Wealth because we want you advisors and wealth managers, not just to buy AI," he said. "We want you to buy back your time. And so we're giving

you the same institutional-grade hedge fund level muscle, but now for going from a bunch of loose words to a full client-ready note in less than 30 seconds."

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Archive Intel

Archive Intel CEO Larry Shumbres
Rob Burgess/Financial Planning

Larry Shumbres, founder and CEO of Archive Intel, said his firm wants to solve the problem of advisors carrying two phones.

AI-powered archiving and surveillance tool Archive Intel encompasses everything from text messages, social media, chats and email to website communications, he said.

"We're going back to the old BlackBerry days," he said. "Whether you have another phone to communicate with your clients to capture that, or you're using another app with a different phone number, we're making it a lot easier for you

today. You could use your own phone, your own phone number, but you can whitelist or block your client contact list, so you don't need another phone, you don't need another phone number."

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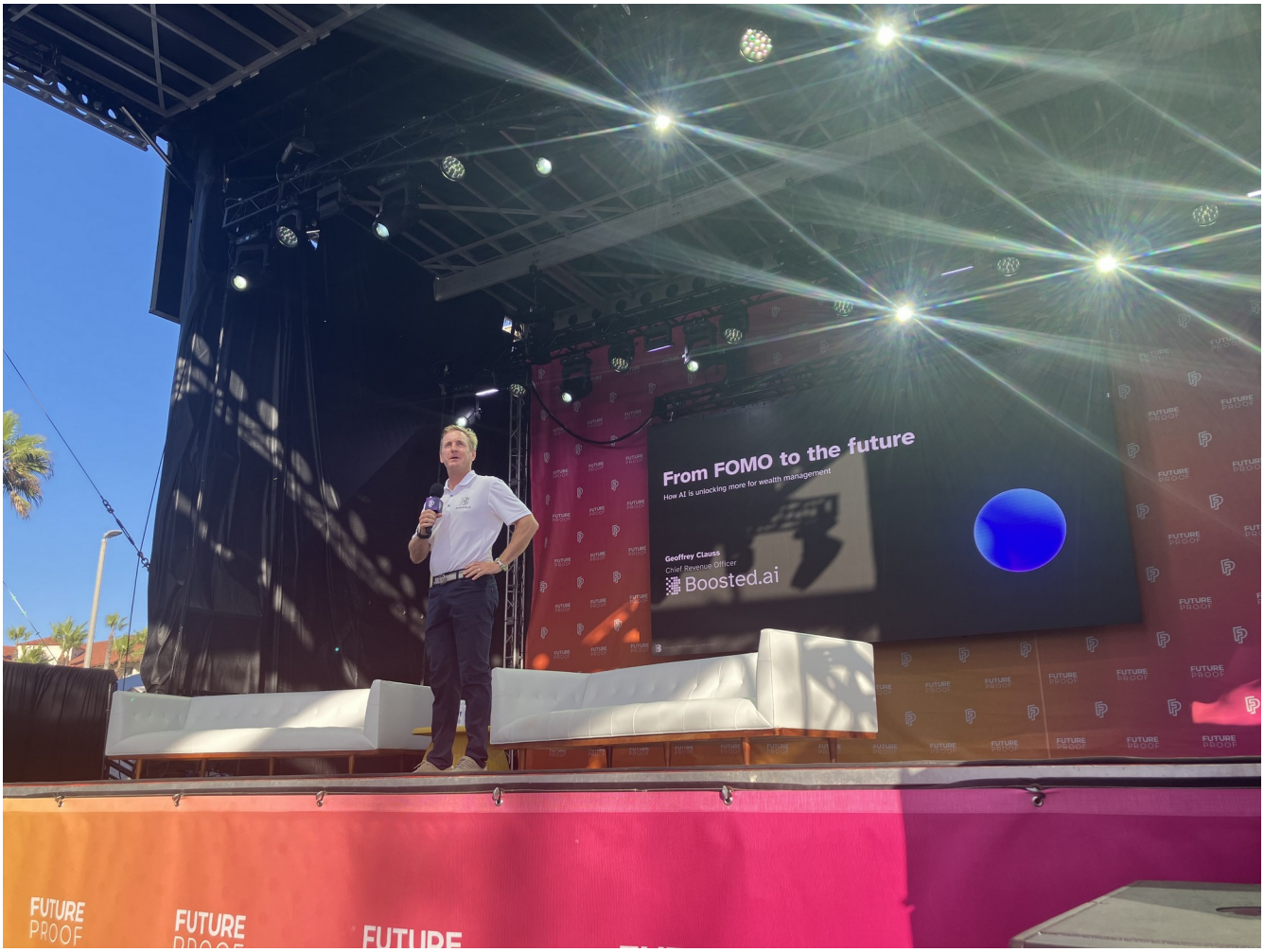
Boosted.ai



Boosted.ai Chief Revenue Officer Geoff Clauss
Rob Burgess/Financial Planning

Alpha is Boosted.ai's agentic platform and is focused on investment research, analytics and client servicing.

"Alpha can look at your portfolios," said Geoff Clauss, chief revenue officer of Boosted.ai. "Alpha knows what things you've told it you're focused on."

Alpha can monitor the world for what's going on and then provide either alerts to advisors or clients, depending on the settings, said Clauss.

"You stay on top of this stuff so that your clients don't have to get concerned," he said. "You don't have to have that moment of fear and sweating when the client calls you and says, 'What happened over here? How's my portfolio reacting to it?' You're ahead of it."

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Wayvest

Wayvest CEO Brendan King
Rob Burgess/Financial Planning

Wayvest's agentic AI platform allows advisors to "vibe code" financial plans using natural language prompts said CEO Brendan King.

"The software can just build whatever we tell it," he said. "You're giving the tool context, and on the back end, it's just writing a bunch of code. It's citing all its sources, but it's writing code to render the plan."

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Sherpas Wealth Technology

Sherpas Wealth Technology CEO Borja Edo
Rob Burgess/Financial Planning

Borja Edo, co-founder and CEO of growth platform Sherpas Wealth Technology,said his firm's goal is to automate the process from lead to client, "to allow advisors to close more business faster and with less effort."

Edo said this can be accomplished through Sherpas' three AI agents: intake for data, a paraplanner for financial planning and portfolio analyst for investment proposals.

"We call them teammates because advisors tell us that it feels like having a team behind them working with them," he said.

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